

Demand Response Research Center Program Development and Outreach Services Scope of Work

March 19, 2004

OVERVIEW

The Environmental Energy Technologies Division of the Lawrence Berkeley National Lab has an exciting opportunity for a contractor to provide program outreach, project management, and general administrative oversight for a newly launched program. The contractor will work under the direction of the Research Director of the California Energy Commission's Public Interest Energy Research (PIER) Demand Response Research Center to carry out the following responsibilities:

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- Build and maintain Center partnerships and external communications, representing the Center to external entities
- Communicate Center policy objectives to a broad audience
- Coordinate administrative activities of the Center's research performers and the Center's technical Staff, including planning and tracking of budgets, project plans, schedules and subcontracts for the Center's various research projects
- Develop and review presentation materials, planning events, and vehicles for communicating the results of new and ongoing research activities
- Coordinate electronic and printed media communications activities, web site development, and other outreach support functions
- Assist in conducting research planning meetings and coordinating activities of the Center's Partners Planning Committee

The Contractor will be expected to work closely with LBNL staff who will be responsible for Center clerical support, procurements, and detailed budget analysis/ reporting, along with website implementation and design and production of communications collateral.

The Center is currently budgeted for 3 years. This subcontract will be issued for one year, with the opportunity to renew based on first year's performance.

CONTRACTOR RESPONSIBILITIES AND YEAR ONE DELIVERABLES

Contractor responsibilities and year-one deliverables are detailed below.

Multi-Institutional Relationships, Program Outreach and Communications

Conduct Center program outreach to Center stakeholders: Control, Metering and Information System Developers, Aggregators and Program Implementers, Utilities, Industry Trade Associations, Policy Makers (CEC, ISO, CPUC, etc.), Researchers,

Building Owners, Engineers, and Operators, and Building Equipment Manufacturers. Work with Research Director to recruit participants in Partner's Planning Committee, develop relationships with potential researchers, and manage ongoing relations with members. Under general guidance from Research Director, interact independently with a variety of levels of Center participants including CEC Staff, utility staff, DOE, researchers, and other stakeholders. Specific responsibilities include:

- Coordinate communications among Project Leads and manage information exchange within the Program to maximize Program value.
- Coordinate and assist in development of a wide range of scientific presentation materials for external representation of Center research.
- Review and organize materials developed by the Center researchers to ensure clear focus, consistent presentation style, and coherent message.
- Work closely with EETD Communications Office to oversee, track, and resolve issues relating to materials developed by the office.
- Build and maintain multi-institutional partnerships.
- Establish and maintain communication channels and processes with external entities.
- Generate multi-institutional financial support for the Center and identify opportunities for multi-institutional research collaborations. Develop collaboration plans and identify projects of mutual benefit and interest between the Energy Commission and other institutions.

Tasks (first year)

- Establish, update and maintain database of Demand Response stakeholders
- Recruitment and organization of Partner's Planning Committee
- Work with LBNL Communications Office to create identity for Center, including logo, website
- Attend meetings, conferences, workshops to represent the Center and its work
- Plan and organize, advertise and recruit participants for key workshops, conferences and/or meetings

Center Administration and Operations

Establish, implement, and manage project management system to ensure the various Center participants meet milestones and project goals, on time and within budget. Prepare and coordinate project scheduling and budgeting activities. Responsible for overall Center budget management to ensure Center and project goals are fully met, and ensure early identification of potential budget constraints and possible opportunities for mid-course adjustments. Work closely with LBNL Procurement Office and budget staff to prepare for, coordinate, and track all solicitations and R&D subcontracts relating to the Center in timely manner. Plan, implement, and coordinate events relating to the Center Partners Planning Committee, Center staff, Technical Staff, Research Performers, and Technical Advisory Groups. Organize Annual Program Review and Critical Project Reviews.

Tasks (first year)

- Establish operational procedures for Center

- Plan for and organize structure and support for Partner's Planning Committee and Project Advisory Committees
- Establish and implement tracking system for program milestones
- Work with LBNL budget staff to develop Center budget management guidelines and procedures
- In accordance with CEC contract, monitor technical, financial and schedule progress of contract with CEC; manage resources to milestones; plan for and coordinate Critical Program Review meetings
- Work with LBNL procurement staff to develop subcontract guidelines for Center; recommend new subcontracts as necessary
- Establish productive working relationship with Center technical staff, Center research performers and LBNL support staff; ensure staff understand operational guidelines

Reporting

Plan for, schedule and coordinate the preparation of all project reports, deliverables and invoices to the CEC and deliver them to the CEC in accordance with the program schedule. Develop and organize the Center Annual Report and related documents. Work closely with LBNL administrative and technical staff and with the CEC Contracts Manager to resolve reporting issues.

Tasks (first year)

- Establish guidelines and timelines for Center and Research Project reporting
- Coordinate production of monthly and other periodic reports to the CEC contracts manager in compliance with CEC Contract, working with technical and support staff, and communicating with CEC contracts manager on a regular basis on reporting issues.
- Coordinate preparation of Annual Report
- Coordinate all aspects of Annual Program Review

CONTRACTOR QUALIFICATIONS

- Demonstrated understanding of technical, economic, and public policy issues related to energy efficiency, demand side management, and energy policy.
- Familiarity with California's electric utilities, government organizations, and related professional associations.
- Demonstrated experience in collaboration and partnership building.
- Public speaking and presentation experience.
- Strong communication and interpersonal skills necessary for interacting with a variety of government, utility, and private organizations.
- Experience with outreach and utility industry communications, including organizing large workshops, conferences, events.
- Ability to plan, coordinate, track, and provide feedback reports on multiple projects using a software application such as Microsoft Project. Strong

organizational abilities, including ability to identify, obtain, and synthesize information from diverse sources.

- Experience preparing status reports, annual reports and other documents provided to sponsors and stakeholders; excellent written English.
- Demonstrated budgeting, procurement, and contracting experience.
- Track record of establishing priorities between competing projects, attention to detail and follow-through.
- Ability to work with a wide variety of external and internal parties from different workplace cultures to ensure desired outcomes in a cooperative and timely manner.
- Willing to conduct extensive travel.

ABOUT THE DEMAND RESPONSE RESEARCH CENTER

The California Energy Commission's Public Interest Energy Research (PIER) program is launching a Demand Response Research Center led by Lawrence Berkeley National Laboratory. Demand Response (DR) includes load response for reliability purposes, load response for procurement cost minimization purposes and price response by end-use customers for bill management. Two main drivers for widespread demand responsiveness are the prevention of future electricity crises and the reduction of average electricity prices.

The main objective of the Center is to develop, prioritize, conduct and disseminate research that develops broad knowledge to facilitate DR. The DR research will cover technologies, policies, programs, strategies and practices, emphasizing a strong connection to the DR market and policy makers through substantial stakeholder input. The Center will focus on the following activities: create a research roadmap for DR in California; establish multi-institutional partnerships; foster connections with stakeholders through outreach efforts; sustain long-term attention to DR research topics; conduct research, development, demonstrations and technology transfer.

DEMAND RESPONSE RESEARCH CENTER

